

BROUGHT TO YOU BY THE TEAM GUIDING HR THROUGH THE AI SHIFT

AI in HR WEEK

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DAY 1 • MONDAY, JULY 20

The HR Tool Stack

Your friendly, no-hype guide to picking the right AI for the job.

There's a lot out there — new tools every week and endless opinions about which one “wins.” We're skipping the hype and the leaderboards. This guide highlights the AI tools that are low- or no-cost, widely available, and tested by people who actually do HR work.

Some you've probably used. Some will be new. But somewhere in here, there's an unlock for everyone.

Today's guide will help you align the way you work with AI to the best tools for the task at hand. You'll see our top tool picks, their strong use cases, where we wouldn't recommend, and you'll even discover some new tools and functions to help you in the most “only HR” moments. Let's go!



So — Which Hat Do You Need AI to Wear?

We get this question constantly: “What’s the best AI tool for a recruiter? For payroll? For someone who uses our HRIS?” Our honest answer — that’s the wrong place to start. Instead of matching a tool to your *title*, start with the *type of work* you’re doing with AI in the moment. Are you asking it to be an Assistant? A Strategist? A Coach? Name that first, and the right tool gets a lot easier to find.

(Hold onto this mindset — it matters even more when we talk about bringing AI to your whole organization.)

Assistant *“Write this for me.”*

Draft, rewrite, summarize, brainstorm. It produces, you edit. For when you need a fast first version — an offer letter, a job posting, a policy in plainer English.

Strategist *“Help me think this through.”*

Hand it your data or your problem and work it through — patterns in turnover, themes across a survey, the options for a tough call. Not just producing; thinking alongside you.

Coach *“Challenge me on this.”*

It pressure-tests your judgment before you commit — a pre-mortem on a big decision, the pushback you’d want from a trusted peer, the blind spot you can’t see on your own.



A NOTE FROM AI GURU LAUREN PATEL

So here’s how we’ll do this: for each hat you might need AI to wear, I’ll show you what we’re finding works well for HR right now — not the only answer, just a strong, current starting point from someone who lives in these tools every day.

Now Let's Find the Tools That Fit You

Here's something that'll save you a lot of frustration: no single tool is great at everything. Asking one tool to do every job is like asking your best recruiter to also run benefits open enrollment — they'll work hard to get it done, but it's not the strongest way to leverage their talent. The goal here is to first leverage what you already have: where it's strong, where it has gaps, and where another tool might fill them. Start with the logo you recognize and then explore the rest.



ChatGPT → p.4



Copilot → p.6



Claude → p.4



Gemini → p.5



Aaime Hart → p.4



NotebookLM → p.5



Perplexity → p.5

EVERYDAY GENERALISTS

ChatGPT, Claude, Copilot Chat, Gemini, Aaime Hart. You'll probably have a favorite here — or one your organization already chose for you. This is where you'll spend most of your time, and where the strategic HR work happens.

SPECIALISTS

NotebookLM, Perplexity, and Copilot in your apps. Each is built for one specific job. You won't live in these — but when you need what they do, nothing beats them.

EMBEDDED / BUILT-IN AI

The AI already inside the tools you run — your HRIS, ATS, payroll, and benefits platforms (Workday, Paylocity, UKG, and the rest). You don't go get these; they come with what you already use. Best for tasks close to where they live — summarizing a record, drafting inside the system, surfacing what's in your own data. If a tool you rely on adds an AI feature, try it there first before reaching for an outside app.



A NOTE FROM AI GURU LAUREN PATEL

Here's a mental picture I use, and it changes how people work with AI: Some tools are what I call **door tools** — you open the door, grab your one thing, and close it back up. Great for something quick inside a file you're already in. Others are **doors-off**: take the doors off the hinges and let AI stay in the room with you, from the first messy idea to the final call. That's when it stops being a vending machine and becomes a thinking partner.

Both are useful, and the most effective AI users understand when to use each. But when AI becomes an integral part of your working processes, with AI working and thinking alongside you from project ideation through evaluation, you'll know you've achieved the "doors off" status. Each tool is tagged so you know which is which.

The Tools, Up Close

Honest reads — what each is brilliant at, where it's not your best bet, and which hat it wears best. (What's safe to put into them is near the end, under security.)



ChatGPT *generalist · doors-off*

HR + AI Work Type: Assistant, Strategist, or Coach — it happily wears any hat.

Great for: brainstorming, drafting, thinking out loud, making sense of data you paste in, building little custom GPTs you reuse.

Not your best bet for: citable, up-to-the-minute law (that's Perplexity) or staying strictly inside your own files (that's NotebookLM).

My honest read: when you're not sure where to begin, begin here — the comfortable default that rarely steers you wrong.



Aaime Hart *AAIM's HR assistant · doors-off*

HR + AI Work Type: Assistant and Strategist — with an HR brain.

Great for: HR research and thinking out loud with something that already speaks fluent HR. Built by HR pros; she reaches for trusted HR sources first, and can look beyond when you ask.

Not your best bet for: anything confidential about your company or people that hasn't been cleared — same rule as any generalist.

My honest read: when your question is HR through and through, start with Aaime.



Claude *generalist · doors-off*

HR + AI Work Type: Strategist and Coach — your deep-thinking partner.

Great for: long documents (handbooks, contracts, legislation), redlining policy, and writing that sounds human. Hand it a 50-page doc and grill it.

Not your best bet for: real-time web info out of the box, or making images — but keep an eye on Claude Design (still in beta but I'm honestly impressed).

My honest read: my go-to when I need something I can put in front of someone, not just a starting point.

Where's Copilot? It's the one most of you already have, so it gets its own page. Flip to p.6.

LEVEL IT UP: CONNECT YOUR OTHER APPS

Most of these tools connect to the apps you already live in — so you stop the download-upload shuffle. Link up Canva (design without leaving the chat), Slack (drop a summary right where your team talks), and your file storage like Google Drive or OneDrive (point AI at a doc instead of pasting it in). A few connections save real time every week.

The Tools, Up Close — continued



Gemini (in Google Workspace) *in-your-apps · door tool*

HR + AI Work Type: Assistant, right inside your Google files.

Great for: drafting and analysis inside Google Docs, Sheets, and Gmail — already where you work if your world runs on Google.

Not your best bet for: open-ended strategy — it shines inside the file, less so on the big questions.

My honest read: the Gemini chat app is a ChatGPT-style generalist; within your Google apps, Gemini is like Copilot's cousin. Both have their place and they are a top recommendation if you're in the Google Workspace.



NotebookLM *specialist · doors-off*

HR + AI Work Type: Strategist and Learning Partner — bound to your own sources.

Great for: answers pulled only from sources you load, cited to the line — plus quizzes, flashcards, and audio summaries of your own material. (The podcasts created from your own content are a fan favorite)

Not your best bet for: anything beyond the material you give it — which is the whole point.

My honest read: the one people accidentally fall in love with. Studying for SHRM or HRCI? Load your prep and let it quiz you.



Perplexity *specialist · door tool*

HR + AI Work Type: Assistant and Strategist — for research.

Great for: current, sourced answers — a state's latest AI law, a comp benchmark to start from.

Not your best bet for: a final answer you don't check — it hands you sources; you still open them.

My honest read: your research shortcut, not a crystal ball.

Working inside Word, Excel, or Outlook? That's Copilot in your apps (a door tool). Full rundown on p.6.

On Google? Beyond Gemini, Google keeps rolling out new AI tools — like Career Dreamer — and we look to them for specialty functions and what's next.

Which Tool for Which Hat?

Need an Assistant? *(draft, rewrite, summarize)*

→ Any generalist — ChatGPT, Copilot Chat, or Gemini — or Aime Hart for HR-specific work.

Need a Research Assistant or Learning Partner? *(look up a new law, study for a cert)*

→ Perplexity for current, cited answers. NotebookLM to load your own material and get quizzed.

Need a Strategist? *(think it through / read your data)*

→ ChatGPT or Claude — Claude leads on long docs and your own files.

Need a Coach? *(pressure-test a real decision)*

→ Claude or ChatGPT — the deep thinkers worth pulling up a chair for.

Copilot: The One You Probably Already Have

Copilot honestly feels confusing until you understand its intricacies. The first one that matters: which version is **safe** to use under your company’s security, compliance, and governance umbrella. There are two different “versions” of Copilot: the Business version (MS 365) and the Consumer version.



Microsoft 365 Copilot



Signed in through your work account. Inside your company’s security boundary. Safe for confidential, client, financial, and HR data already in the Microsoft ecosystem.



Consumer / Personal



Personal logins or un-approved tools. Not covered — keep sensitive info out, and check with IT before you use it for real work. Often shown without 365 tag.

You mean it’s not all the same?

I keep hearing sentiments like: “I’m underwhelmed by Copilot.” or “It’s just not as good as ChatGPT.” I think I know why — it feels like it should be one system, but it’s really fragmented into different experiences. Once you see it as **separate experiences** — and know which one is secure — it starts to click.

Copilot Chat — the generalist. The chat window (not the buttons inside Word/Excel). You can think, draft, pull sources together, search the web — like ChatGPT, but already on your desktop. This can hold memory and custom instructions, and can work with all types of MS and non-MS items.

Copilot in your apps — the door tool. Living inside Word, Excel, Outlook, and Teams. You’re already in the file, it does the task right there. Not the lesser option; it’s just focused on the task at hand and isn’t your place for strategy, coaching, research or deep work. It also does not utilize the memory or custom instructions you put in Chat. When I need a word doc tweaked right away, this is what I reach for.

If Copilot is your tool, here’s where to go:

When you want to...	Reach for	Where to find it (as of July 2026)
Draft or reply to an email	Copilot in Outlook	top ribbon / bottom-right corner
Rewrite a policy / summarize a long doc	Copilot in Word	top ribbon / bottom-right corner
Compare columns, spot trends, build a formula	Copilot in Excel	top ribbon / bottom-right corner
Recap a meeting + pull action items	Copilot in Teams	the side panel
Draft a memo or pressure-test a plan	Copilot Chat	the Copilot app/icon
A general question (“FMLA vs. ADA leave?”)	Copilot Chat	switch it to Web (if available)



A NOTE FROM AI GURU LAUREN PATEL

One more thing, and it’s the big one: even the best tool disappoints with a weak prompt. The tool matters; the prompt matters more. We shared a framework for exactly this last year — and if you want to make it stick, that’s what Prompt Camp is for. We’ve got you.

For Your Org: Start With Decisions, Not Apps

Everything so far has been about you and your own work. The bigger question leaders keep asking is “how does AI fit how our *whole company* works?” That doesn’t start with picking an app. It starts with a few decisions only leadership can make — with HR in the room. Here’s the shape of it.

1. Start with philosophy, not apps.

Before any tool talk: what is leadership’s stance on AI? What is AI for here, and what is it not for? What’s the desired role AI plays in the business? That one decision drives every tool choice that follows.

2. Take stock of what you already have.

Which systems are you already in — your HRIS, your Microsoft or Google stack, the tools you’re paying for? The biggest benefit? It’s already IN your systems, no additional connections required. It’s often effective to utilize what you have before going to the AI marketplace.

3. Name what you want — and don’t.

The guardrail conversation. This doesn’t necessarily mean “policy.” This usually is done through AI compliance training (recommended for all users) and leadership communication. Don’t think formal; think practical and easily understood so the exploration and experimentation can be done safely.

4. Be a part of the AI decision making.

HR belongs at the table where AI decisions get made. Resources like this help you join the conversation not just as a user, but as someone who can understand its impact throughout an organization and can help the design and implementation succeed for the business and for its employees. With every AI class you take or resource you consume, you’re earning that voice at the table.



WHERE THIS GOES NEXT

This is exactly the kind of thing I help leadership teams work through — the philosophy, what’s already in your stack, the guardrails, and where to start. It’s a different muscle than using the tools yourself, and it’s worth getting right before everyone’s off experimenting in ten directions. When your organization is ready to move from scattered experiments to a shared direction, that’s the conversation to have — come find me.

Quick Gut-Check: Keeping It Safe

“Which tool is the safe one?” is the wrong question — and getting it wrong is how good people land in hot water. Safety isn’t the logo. It’s two things you control:

TWO THINGS YOU CONTROL

1. What you put in. The safer-sounding brand on a free login isn’t actually safer. Generally fine: posted policies, high-level summaries, your own drafts, de-identified examples.

2. Whether it’s inside your company’s security boundary. If you’d normally store the info inside your company’s licensed tools (like Microsoft 365), keep it in the AI that lives there too — it runs under the same permissions and protection. Rule of thumb: confidential, client, financial, regulated, or NDA → your company’s approved, work-account tools. Public, non-sensitive → approved outside tools are fine. When in doubt, keep it inside and ask IT.

KEEP THESE OUT

(of any tool IT hasn’t cleared)

- Employee records, medical or leave info, SSNs
- Payroll & protected personal information
- Non-public financials & trade secrets
- Confidential investigations
- Anything under an NDA

Your Move Today

- 1. Name the hat.** Pick something real this week and decide which role you need AI to play — Assistant, Strategist, or Coach.
- 2. Pick your home base.** Based on what you’ve got and how you work, choose one everyday generalist as your daily go-to.
- 3. Keep the door open.** Take one real task and keep AI open beside you start to finish — not a quick in-and-out.
- 4. Start the org conversation.** Name one place AI could fit how your team already works, and bring it to whoever sets your AI direction.